

# BBG Research Series



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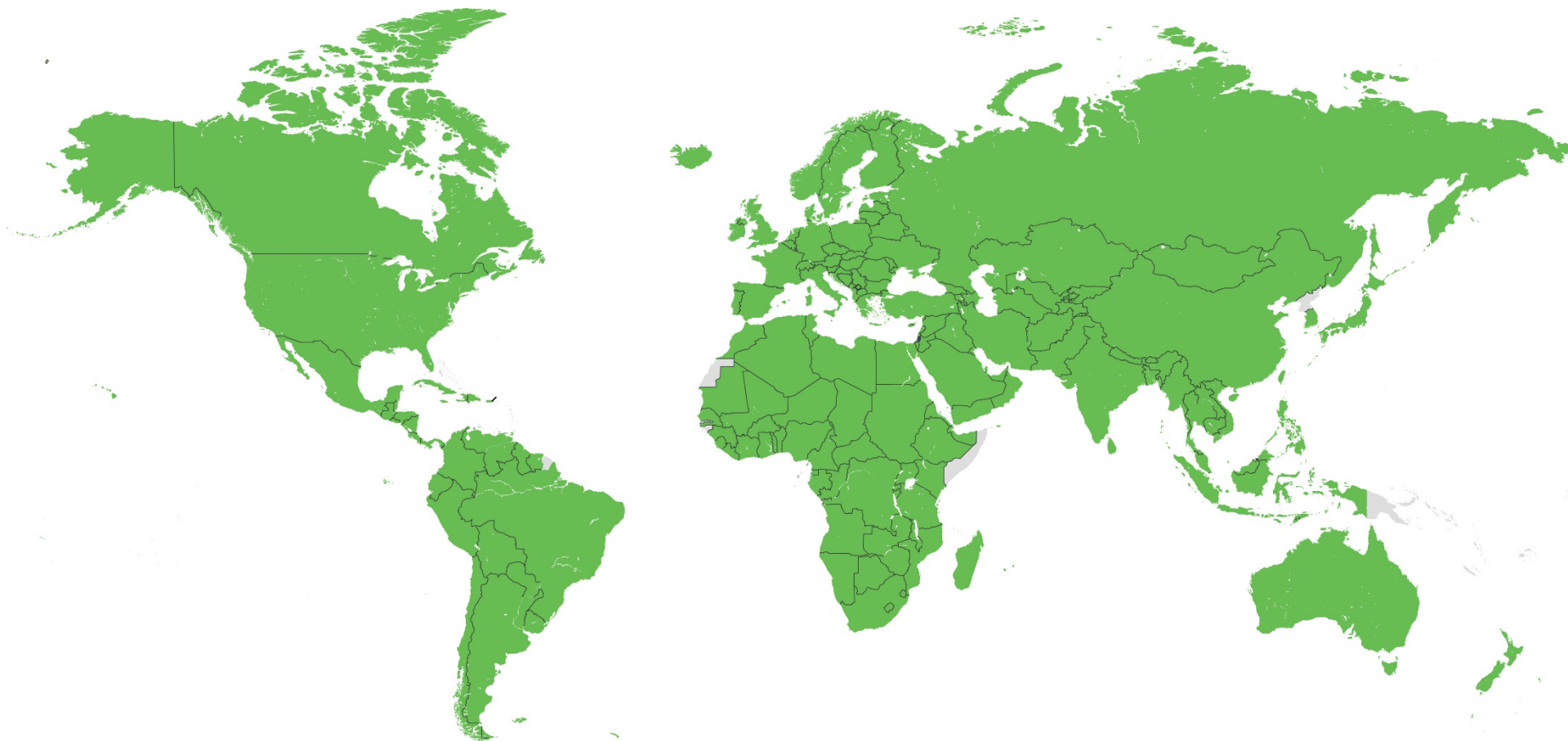
## Strategies For Reaching Digital Media Users In MENA: One Region, Multiple Realities.

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# Gallup World Poll Coverage

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# Gallup World Poll Methodology



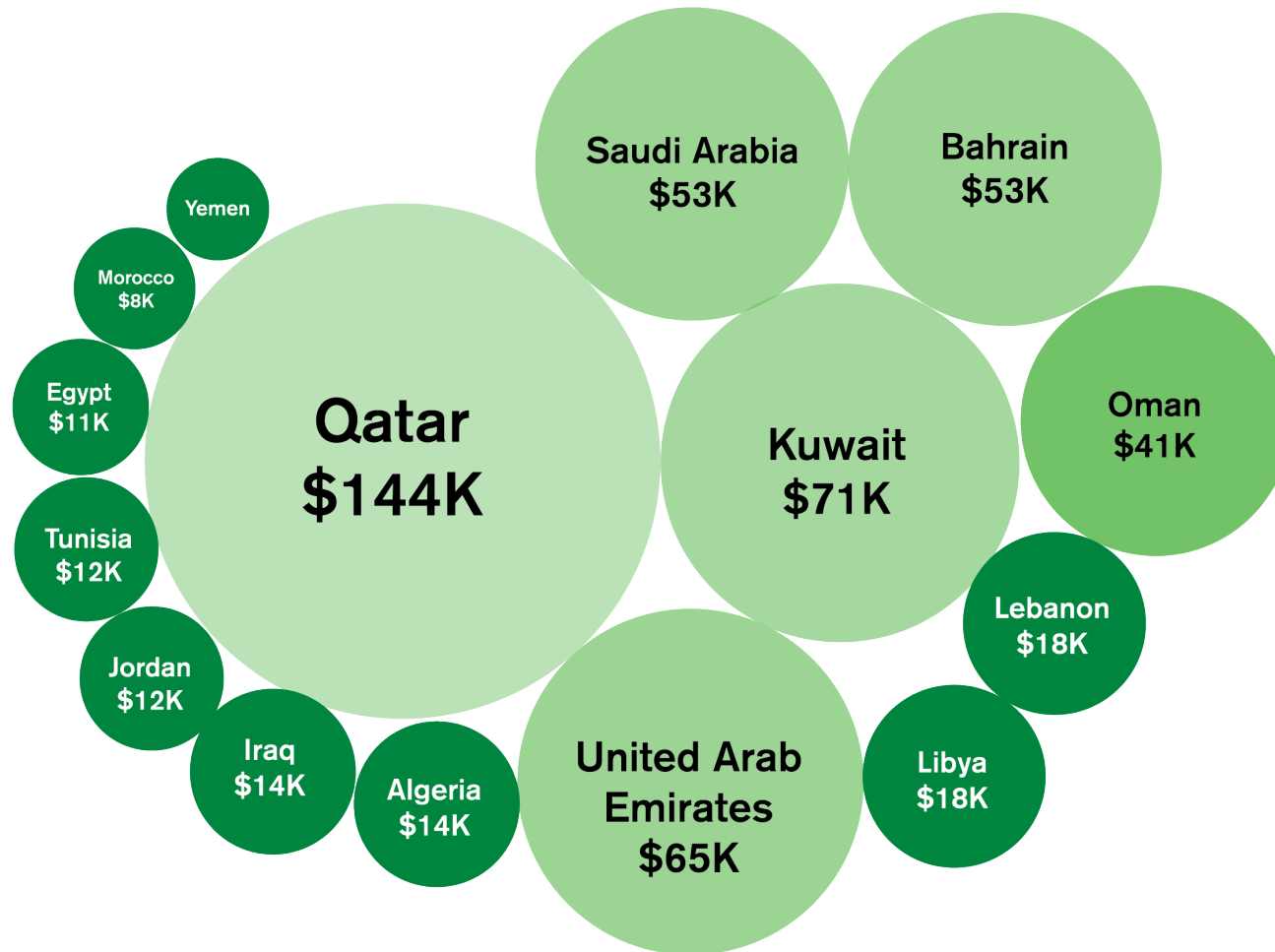
- Nationally representative samples of population aged 15 and older collected in 2015
- Approximately 1,000 interviews conducted per country annually
- Face-to-face, hour-long interviews in respondents' homes or 30-minute telephone interviews
- Interviews conducted in Arabic and English
- Probability-based selection of:
  - interviewing locations (Primary Sampling Units)
  - households
  - adult respondent in household



# One Region, Multiple Realities

## The Economics

# Regional GDP Per Capita

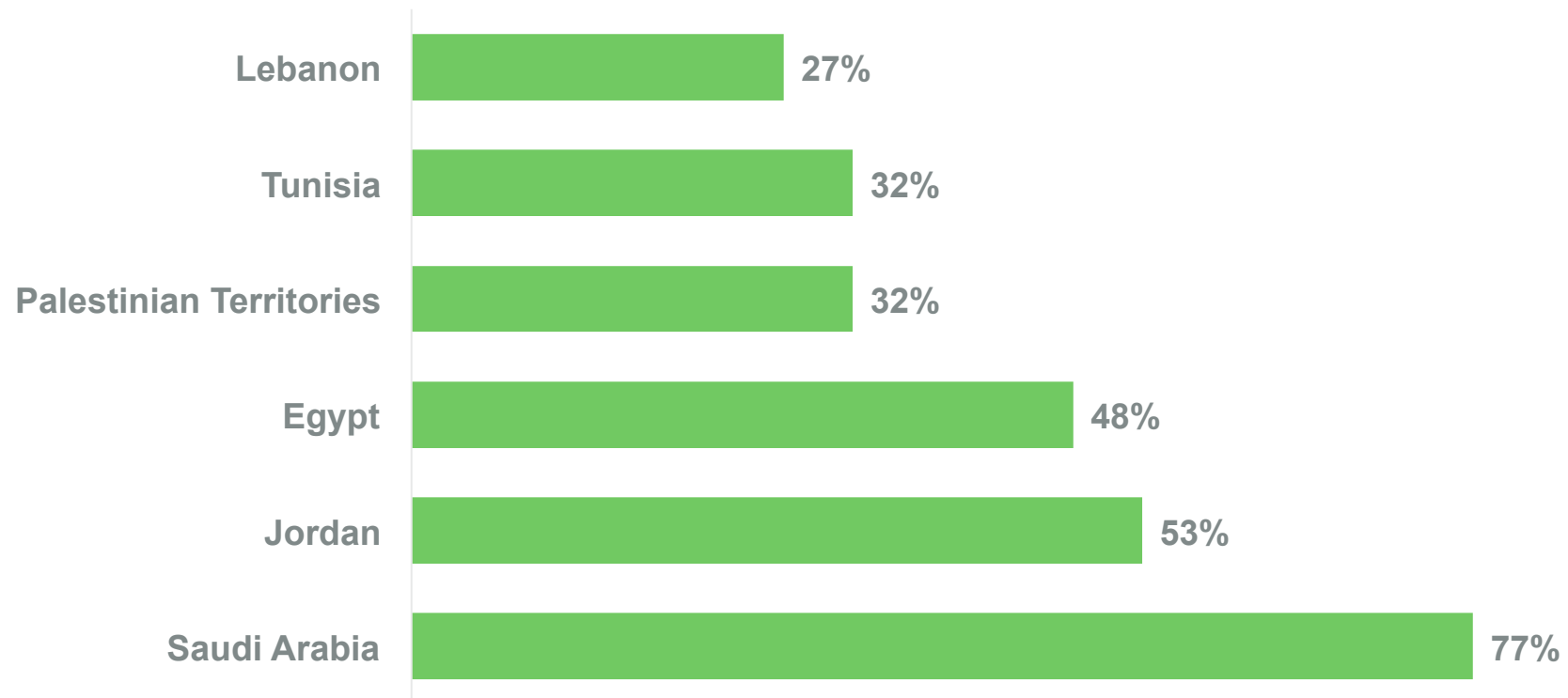


\*PPP in current international dollars, estimates from IMF

# Right now, do you feel your standard of living is getting better or getting worse?

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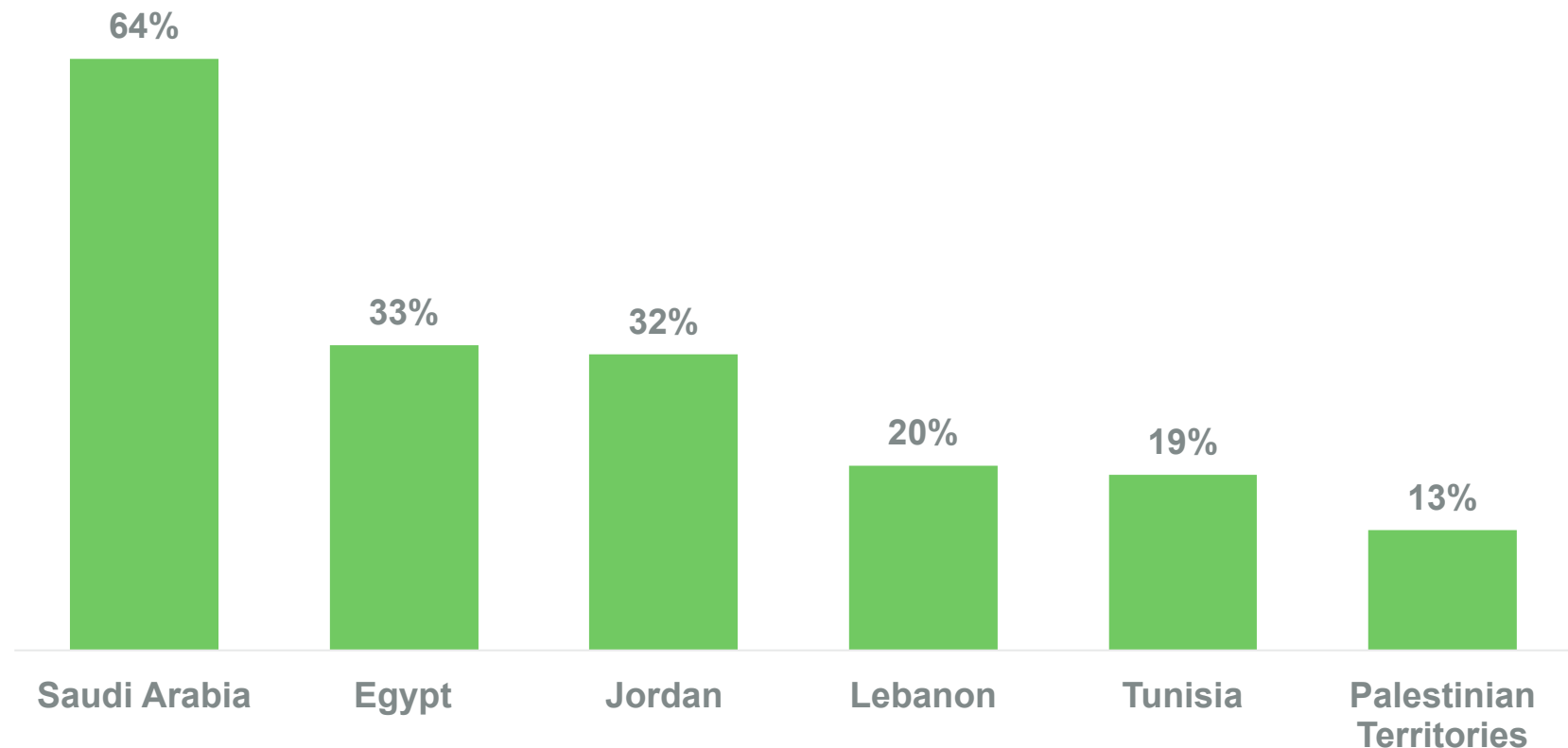
Among total population, % getting better



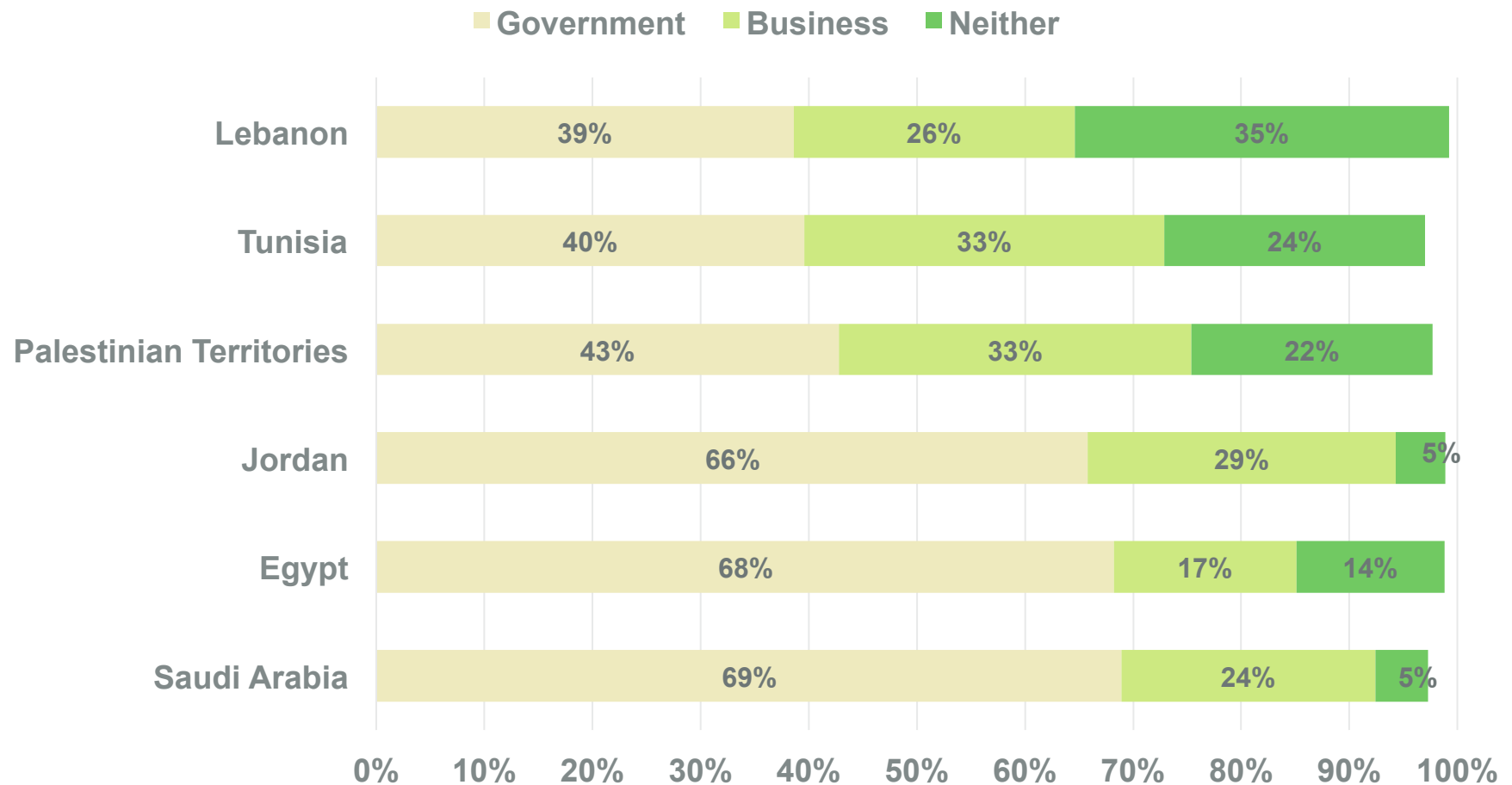
# Thinking about the city or area where you live, would you say that now a good time or a bad time to find a job?

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Among total population, % good time



# Would you rather work for the government or a business?



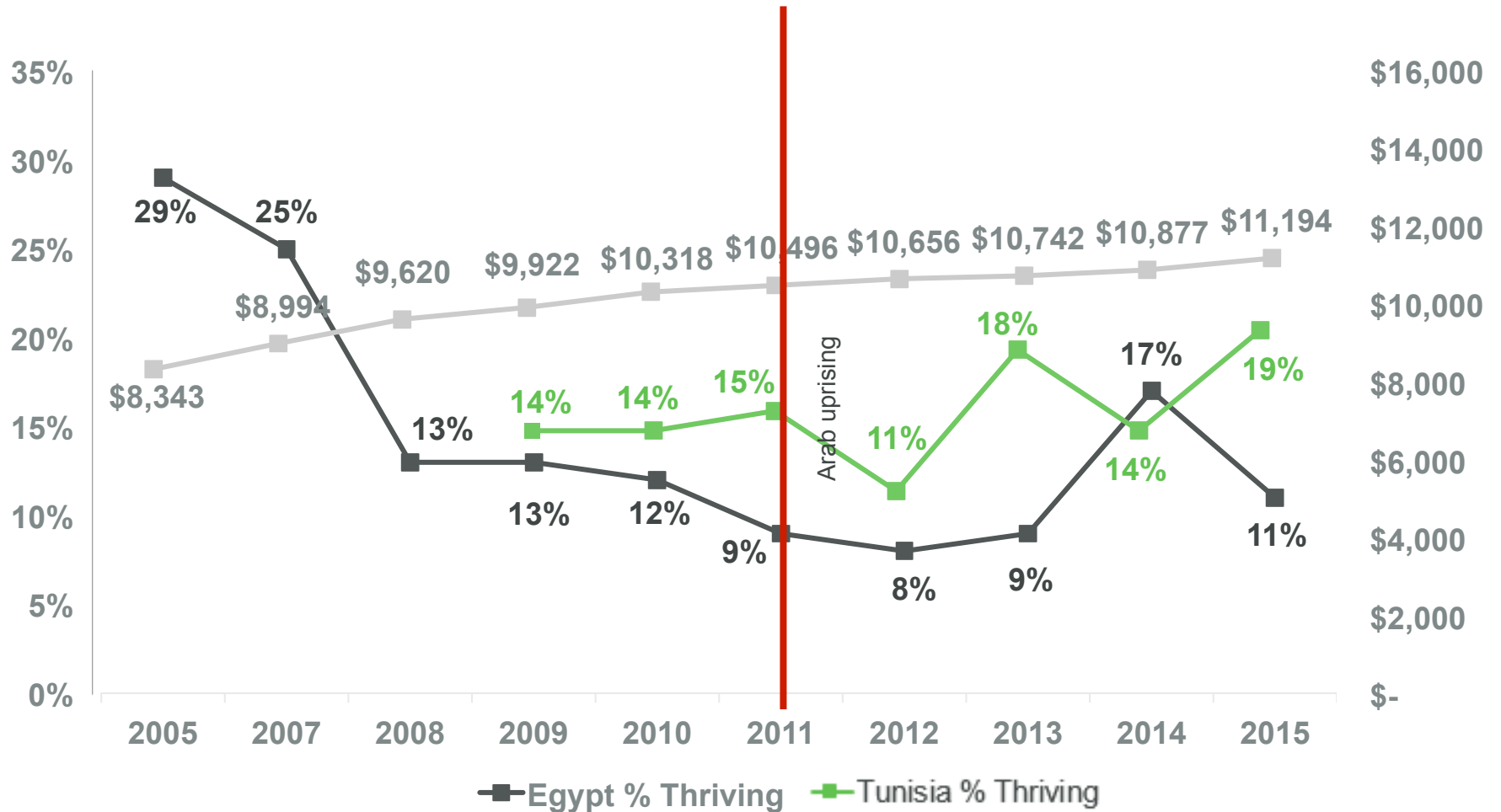




# One Region, Multiple Realities

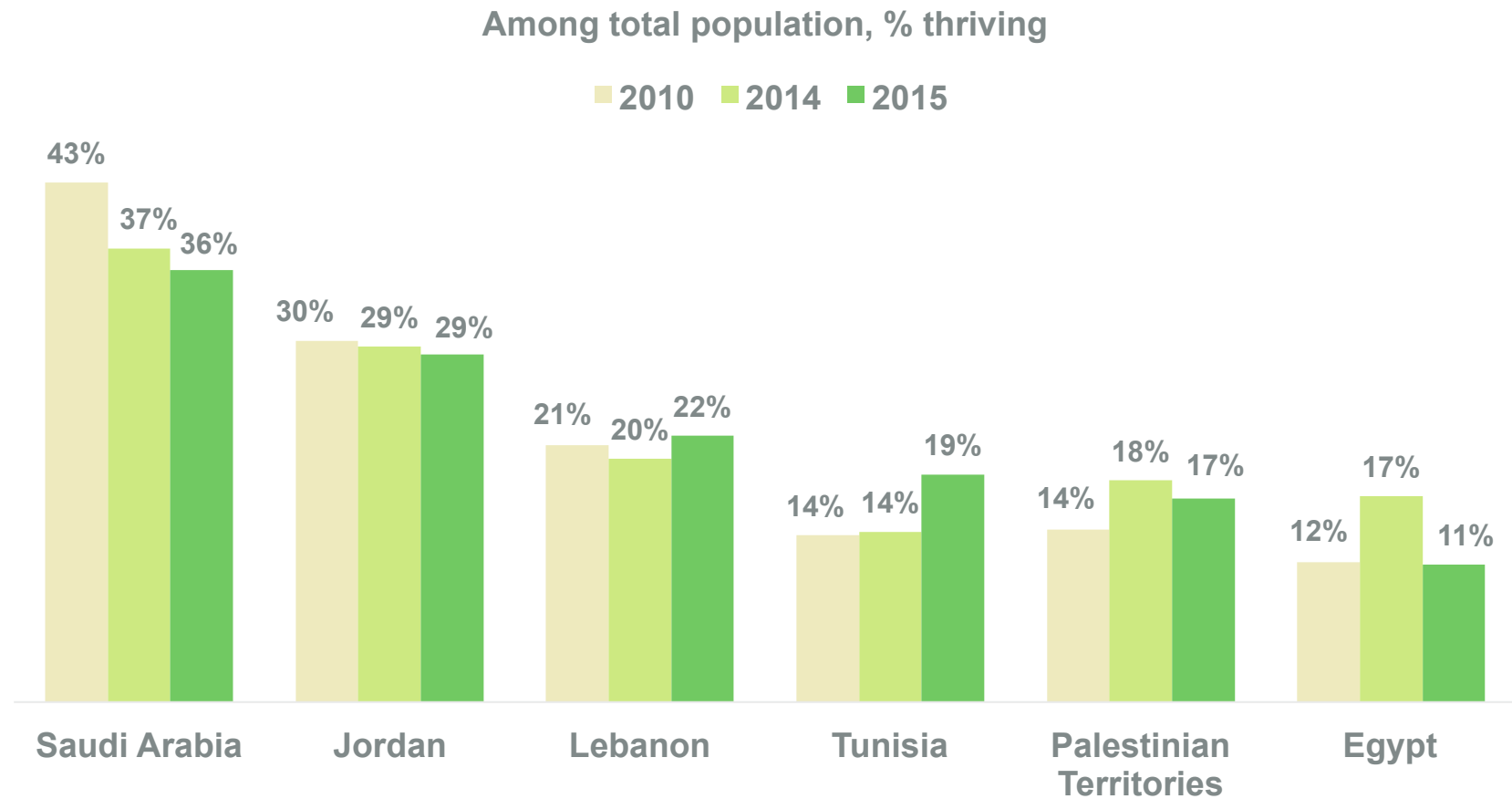
## The Politics

# GDP and Life Evaluations



\*In current international dollars, estimates from IMF

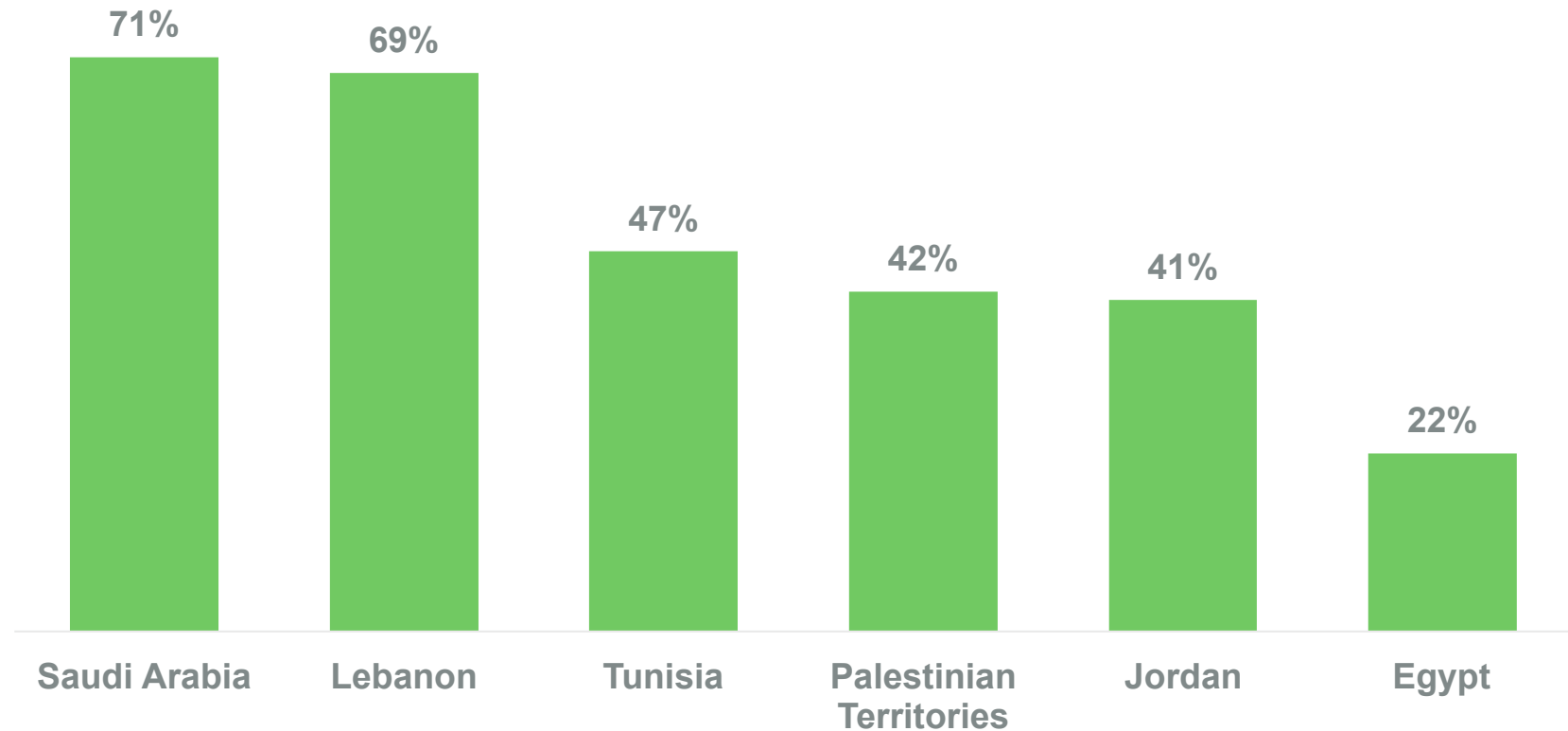
# Regional Life Evaluation



# Does your home have internet access?

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Among total population, % yes



# Thank you

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Mohamed Younis

Gallup World Poll

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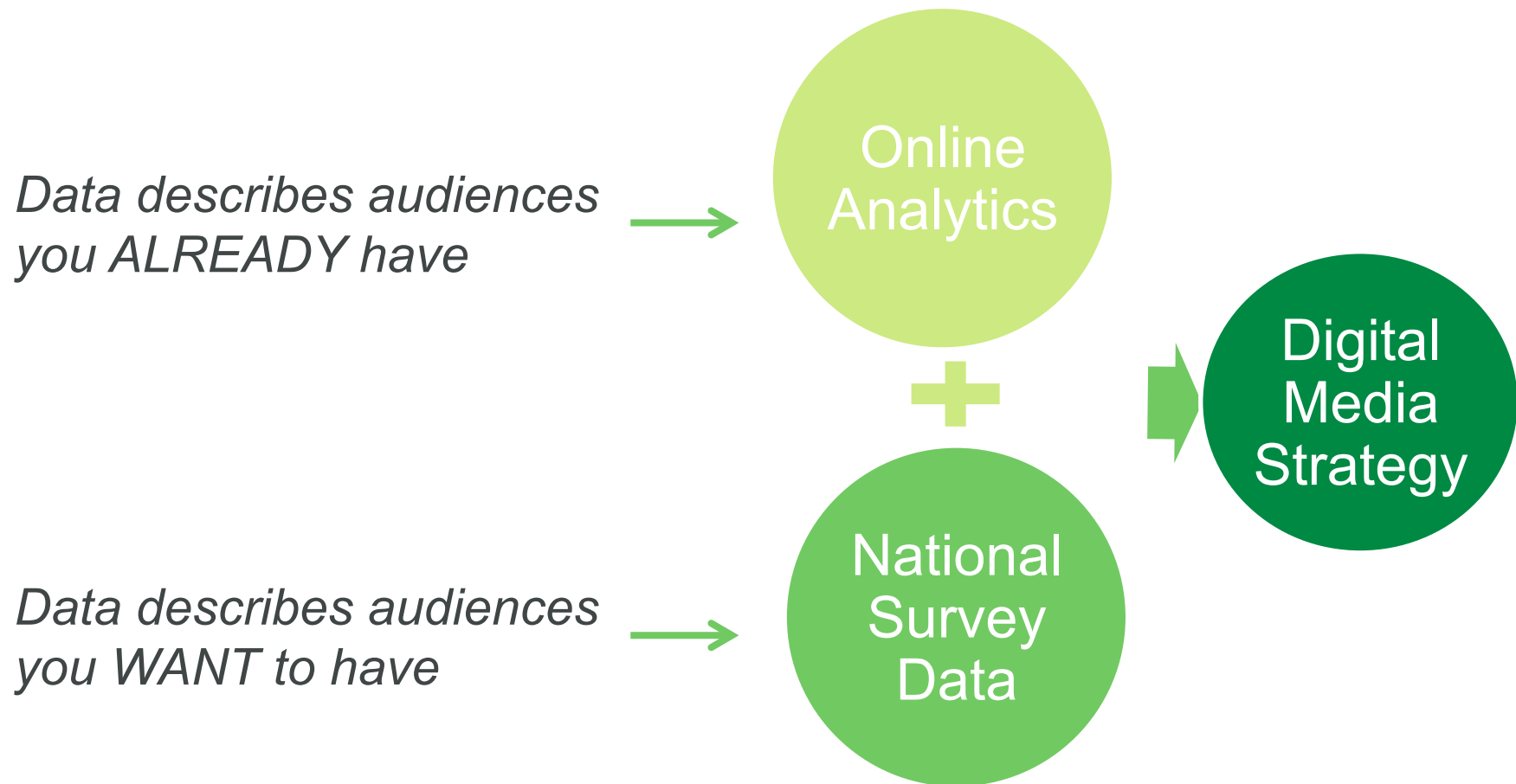
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# Strategies for Reaching Digital Media Users in the MENA Region

# What The Data Tells Us

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# Methodology: National Surveys



- Nationally representative samples of population aged 15 and older in Algeria, Bahrain, Egypt, Iraq, Kuwait, Morocco, Qatar, and Yemen and Saudi Arabia in 2013-2015
- At least 1,200 interviews per country
- Interviews are conducted in local Arabic dialect or standard Arabic
- Probability-based selection
- Face-to-face, one-hour-long interviews in respondents' homes or 30-minute telephone interviews



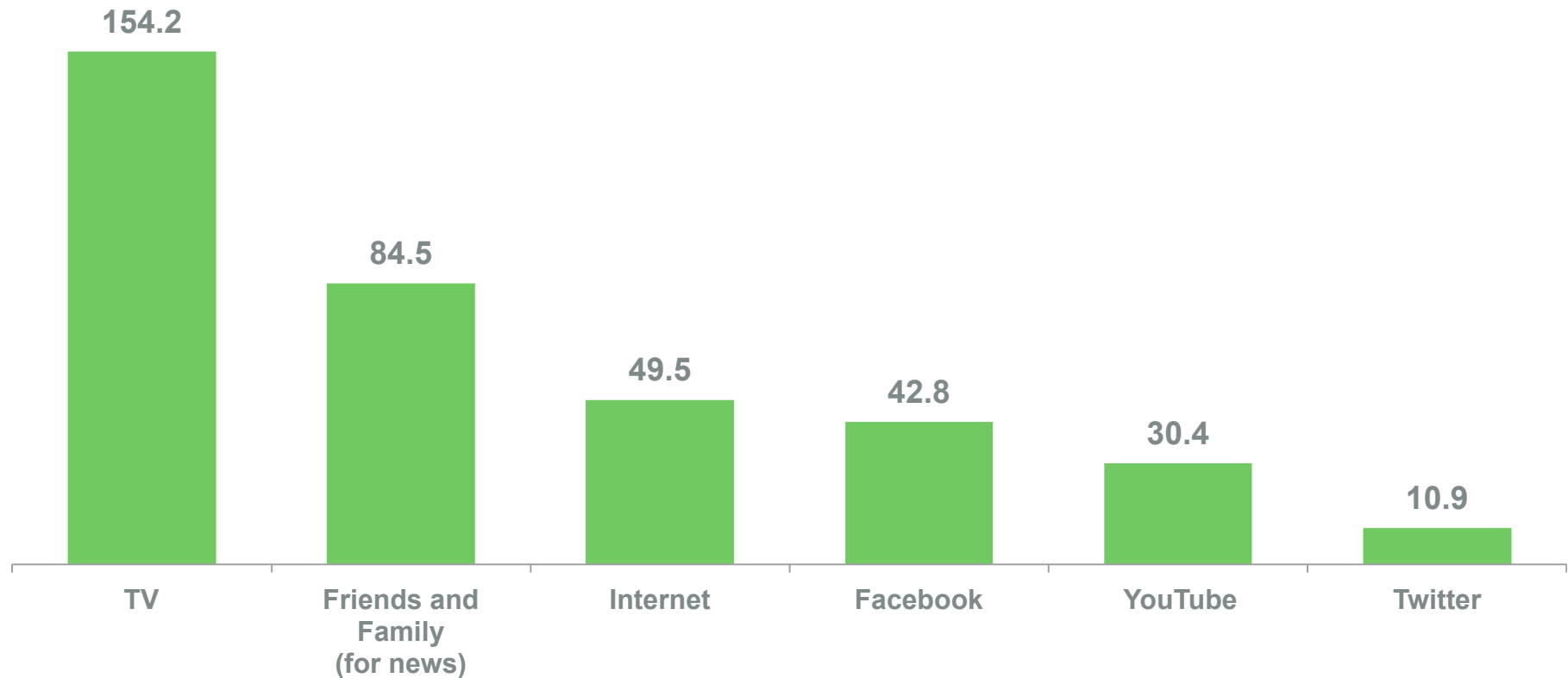
# Methodology: Qualitative Studies

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- In-depth interviews and focus groups with YouTube users in Kuwait and Saudi Arabia (2014)
- In-depth interviews with smartphone owners in Egypt and Saudi Arabia (2014)
- Focus groups with TV viewers in Egypt and Morocco (2015)

# Digital Media in Context in the MENA Region

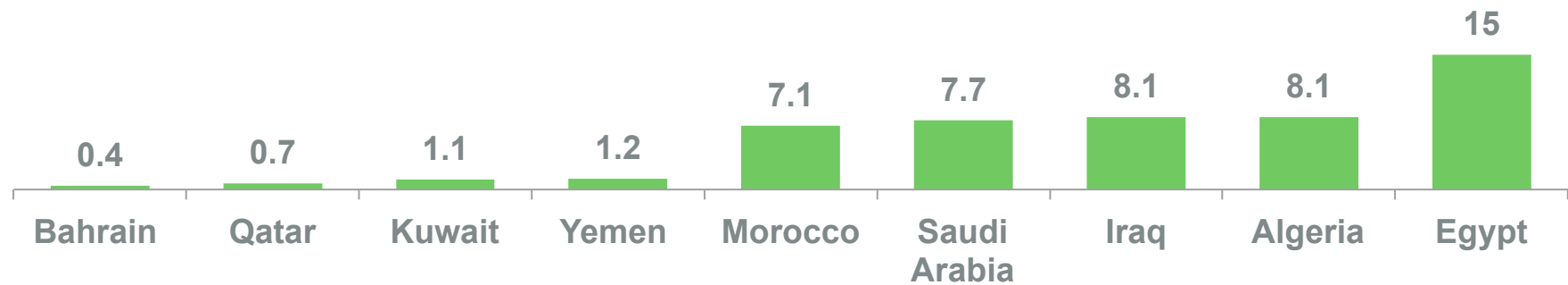
Aggregate number of adults age 15+ using each platform within the past week in nine surveyed countries (millions of people)



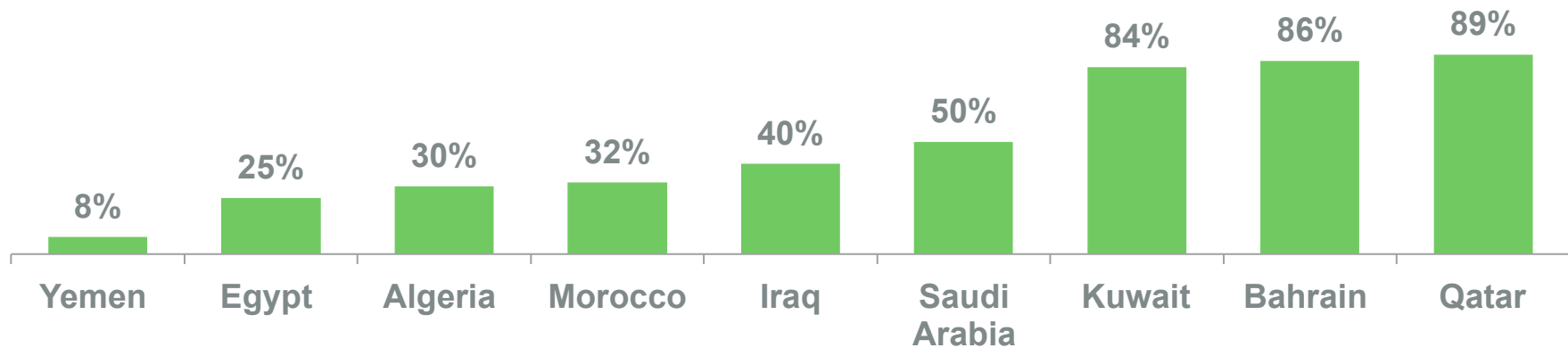
Source: Nationally representative surveys in Algeria (n=2034), Bahrain (n=2003), Egypt (n=2000), Iraq (n=2015), Kuwait (n=1200), Morocco (n=2008), Qatar (n=1500), Yemen (n=1500) and Saudi Arabia (n=2008).

# Internet: Maghreb and Iraq for Largest Audiences...

Number of adults aged 15 and older using the Internet within the past week  
(millions of people)

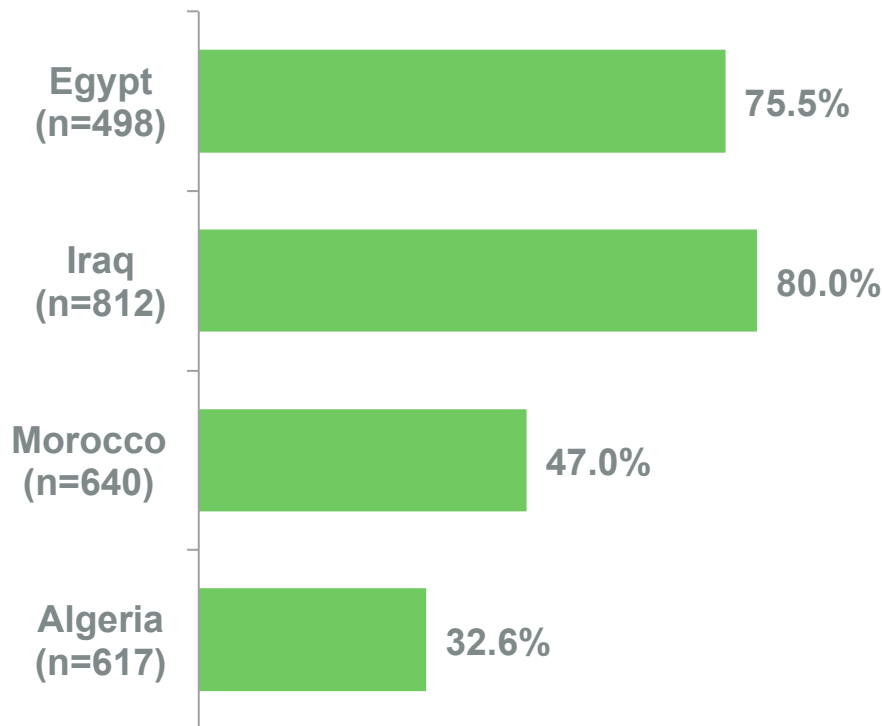


Percent of adults aged 15 and older using the Internet within the past week



# Gear Web Content Both for Mobiles...

Percent of past week Internet users who accessed the Internet via a mobile phone in the past week



- Virtually 100% in Qatar, Kuwait, and Bahrain accessed the Internet via a mobile phone within the past week.

## ...and Computers.

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- In the Gulf, most people use both mobile devices AND laptops to access the Internet; 70% of Kuwaitis who access the Internet via mobile devices also access it via laptop.
- In Egypt, 56% who have watched an online video in the past week have used a laptop.



*“I access the Internet via mobile (when I’m out) and via computer at home.” (Female, Cairo)*

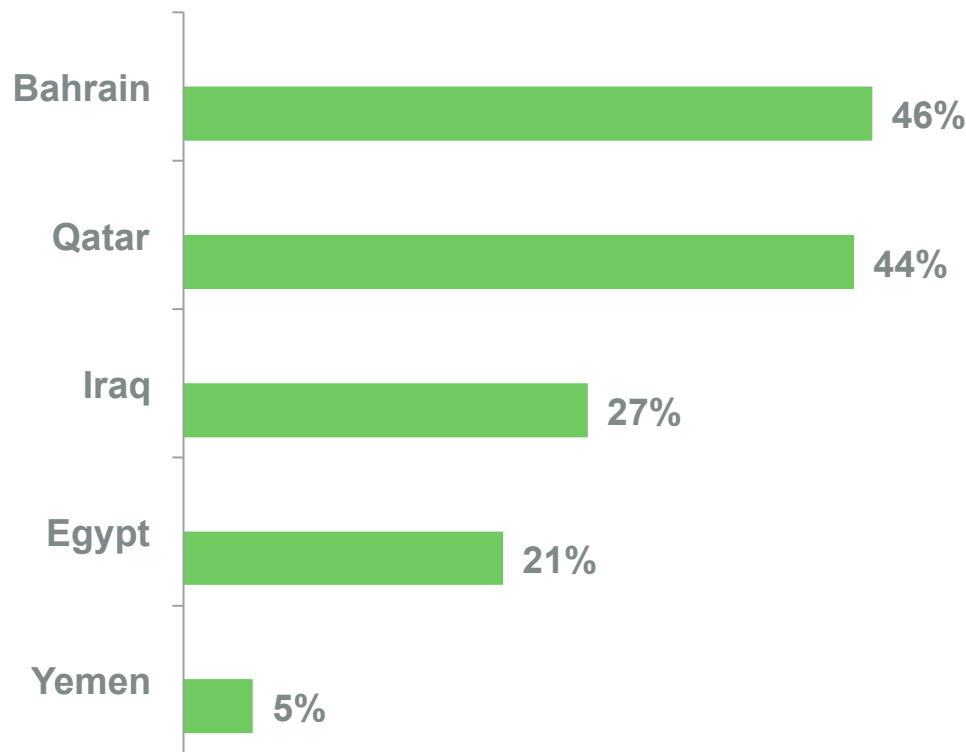
*“Sometimes I prefer a laptop because it has a clearer screen.” (Male, Saudi)*

*“If I am not working, I will watch an online video for two hours.” (Male, Kuwait)*

# Mobile Apps are Popular, but Less so for Traditional News

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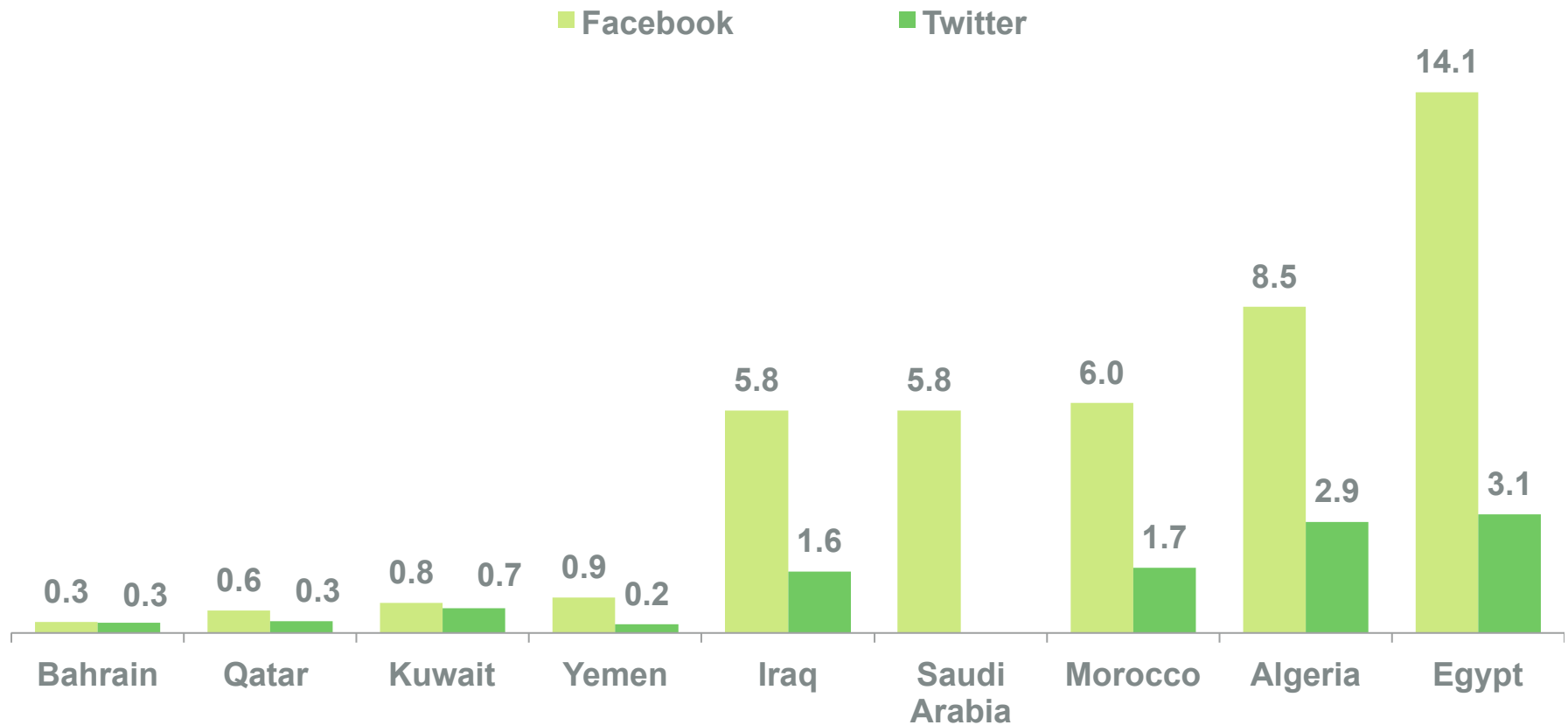
Percent of total population using mobile apps within the past week for news



- In the 2014 Smartphone study, Saudi and Kuwaitis said they used social networking apps (Facebook, WhatsApp, Viber, BBM) much more than news apps.

# Facebook and Twitter: Maghreb for the Largest Audiences

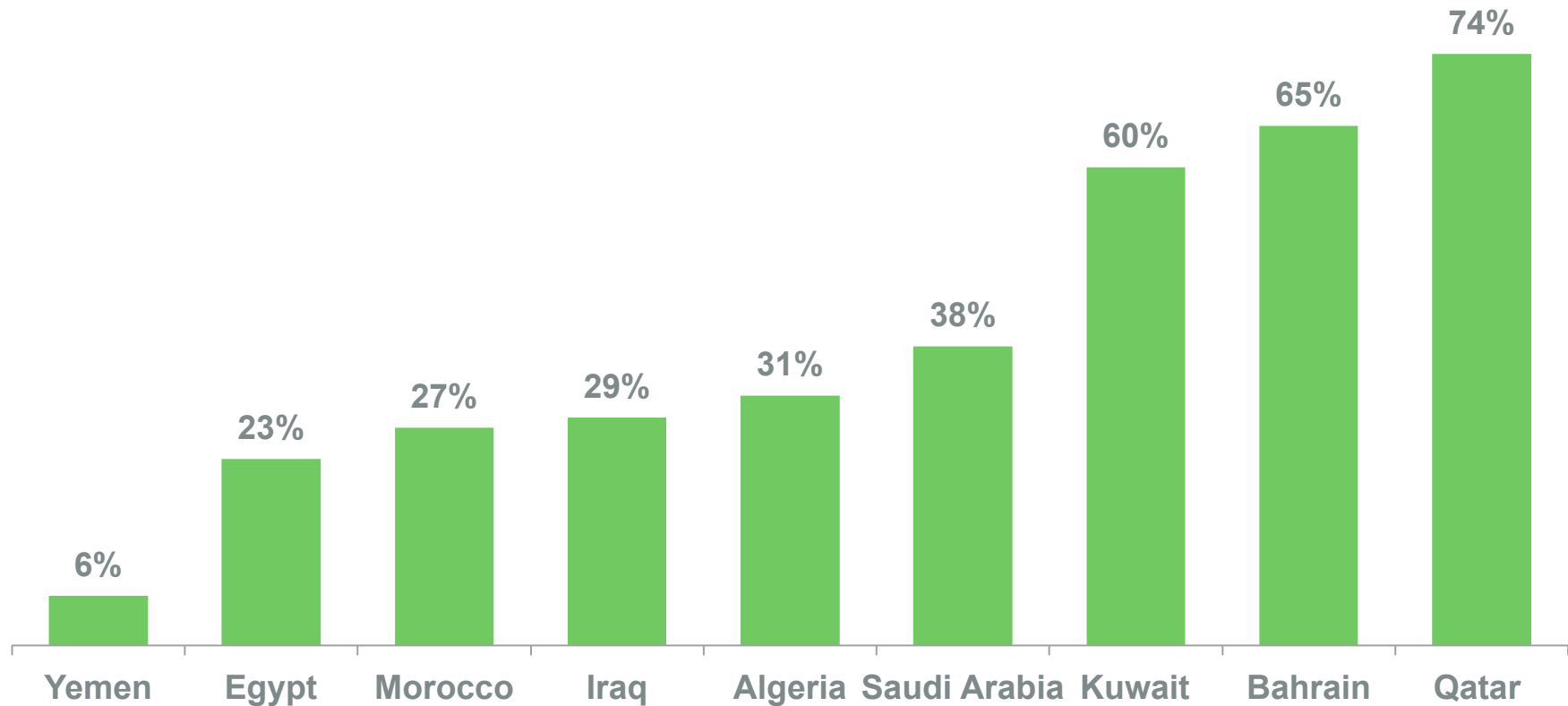
Past week use (millions of adults aged 15 and older)



Source: Nationally representative surveys in Algeria (n=2034), Bahrain (n=2003), Egypt (n=2000), Iraq (n=2015), Kuwait (n=1200), Morocco (n=2008), Qatar (n=1500), Yemen (n=1500) and Saudi Arabia (n=2008).

# Higher Penetration Countries for More Active Users

Percent of population using Facebook within the past week



Source: Nationally representative surveys in Algeria (n=2034), Bahrain (n=2003), Egypt (n=2000), Iraq (n=2015), Kuwait (n=1200), Morocco (n=2008), Qatar (n=1500), Yemen (n=1500) and Saudi Arabia (n=2008).



# Higher Penetration Countries Have More Diverse Facebook and Twitter Audiences

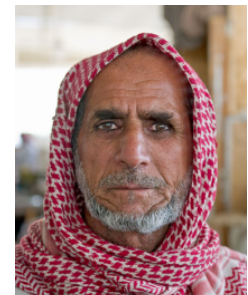
## Egypt Facebook Users Mostly young males

71% male; 56% < 24 y/o  
Base: PW FB users (n=468)



## Qatar Facebook Users Balance of gender and age

59% male, 22% < 24, 43% > 35 y/o  
Base: PW FB users (n=928)



# In Egypt, Twitter Will Reach Highly Educated, Super Digital Users

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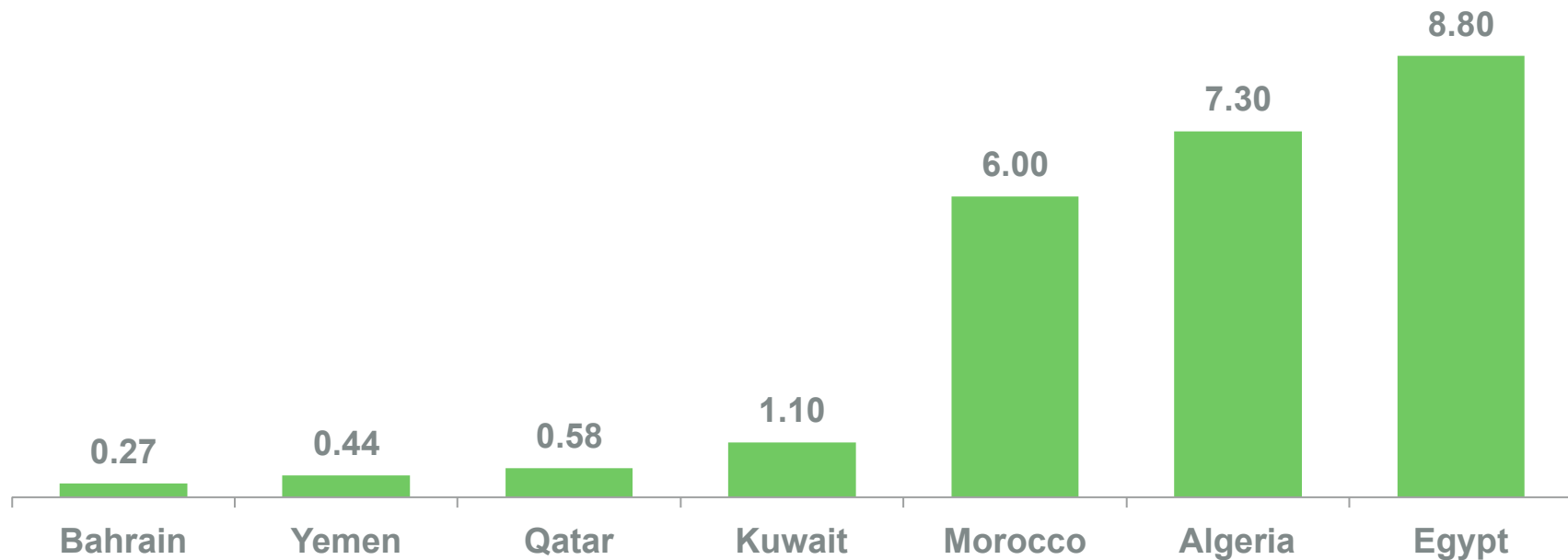
Egypt	% of pw Twitter Users n=105	% of pw Facebook users n=468
Trust Internet	73.4%	59.4%
Facebook for news at least 1x/day	86%	74%
University education or above	47.5%	35%

- In Egypt, 71% of Facebook and 78% of Twitter users are male; 56% under the age of 24.

# Largest Number of YouTube Past Week Users Are in North Africa

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Used YouTube within the past week (number of adults in millions)



# For Some, YouTube is also an Important Source of “Truthful” News TV Coverage

- In Morocco, Saudi Arabia, and Kuwait, YouTube is more popular than Facebook.
- More Kuwaitis named YouTube than any other platform as their most important source of information.

*“Every (platform) completes the other. That means (neither) TV nor YouTube tells you the complete news.” (Kuwait, male, YouTube user)*

*“You get things from the Internet you never get from TV. Most people watch YouTube.”  
(Oujda Morocco, male)*



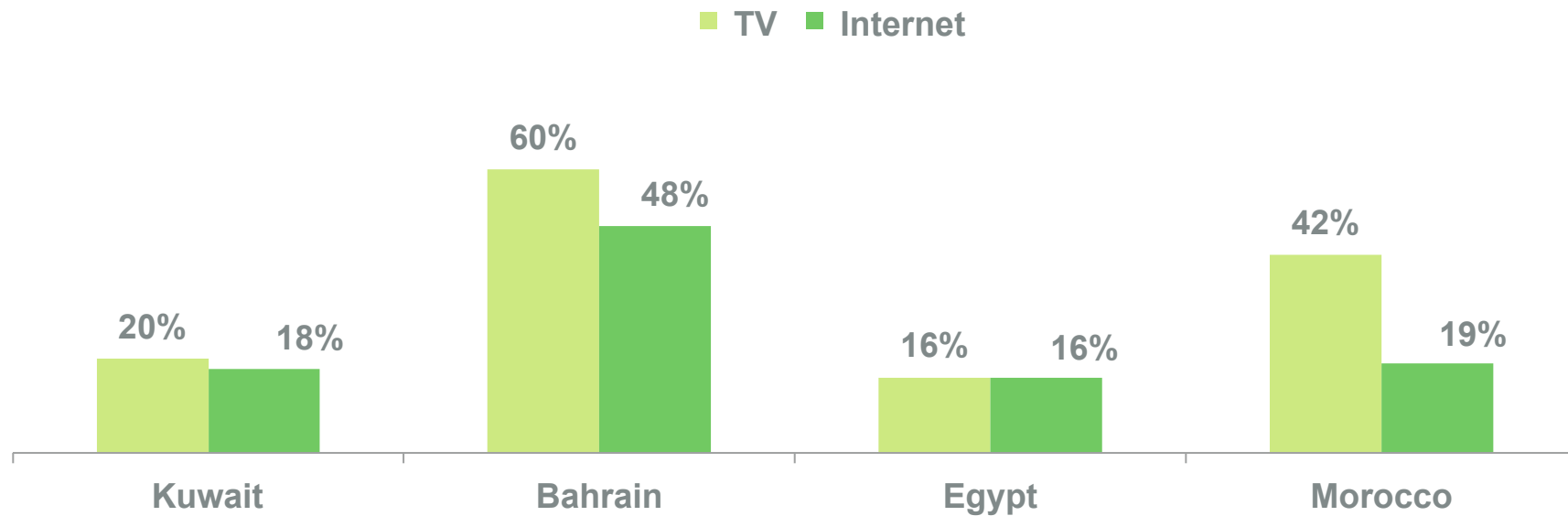
# A Digital Strategy

<b>Audience</b>	<ul style="list-style-type: none"><li>▪ Pick one or two countries with high numbers and one or two with high penetration</li></ul>
<b>Platforms</b>	<ul style="list-style-type: none"><li>▪ Facebook and YouTube for content.</li><li>▪ Twitter to bring attention to content.</li><li>▪ Mobile apps for citizen mediated news</li><li>▪ Integrate digital and traditional platforms.</li></ul>
<b>Countries</b>	<ul style="list-style-type: none"><li>▪ Egypt and Maghreb for large audiences.</li><li>▪ The Gulf for active and diverse users.</li></ul>
<b>Content</b>	<ul style="list-style-type: none"><li>▪ High penetration countries – content for men, women, young, and old.</li><li>▪ Low penetration countries – content for youth, especially men.</li></ul>

# But Lack of Trust in all Media Still a Challenge

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Percent of past week internet users who strongly trust each platform



## And Perhaps, Most Importantly Remember...

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- **Conditions will change** – Keep on asking questions.
- **This is just a start** – Also need to consider politics, government regulations and controls, competitors, deeper differences within and among countries, new technologies, etc.

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